

**T-RecS**  
**For**  
**Grant**  
**Administrators**

2/5/2013

# OBJECTS

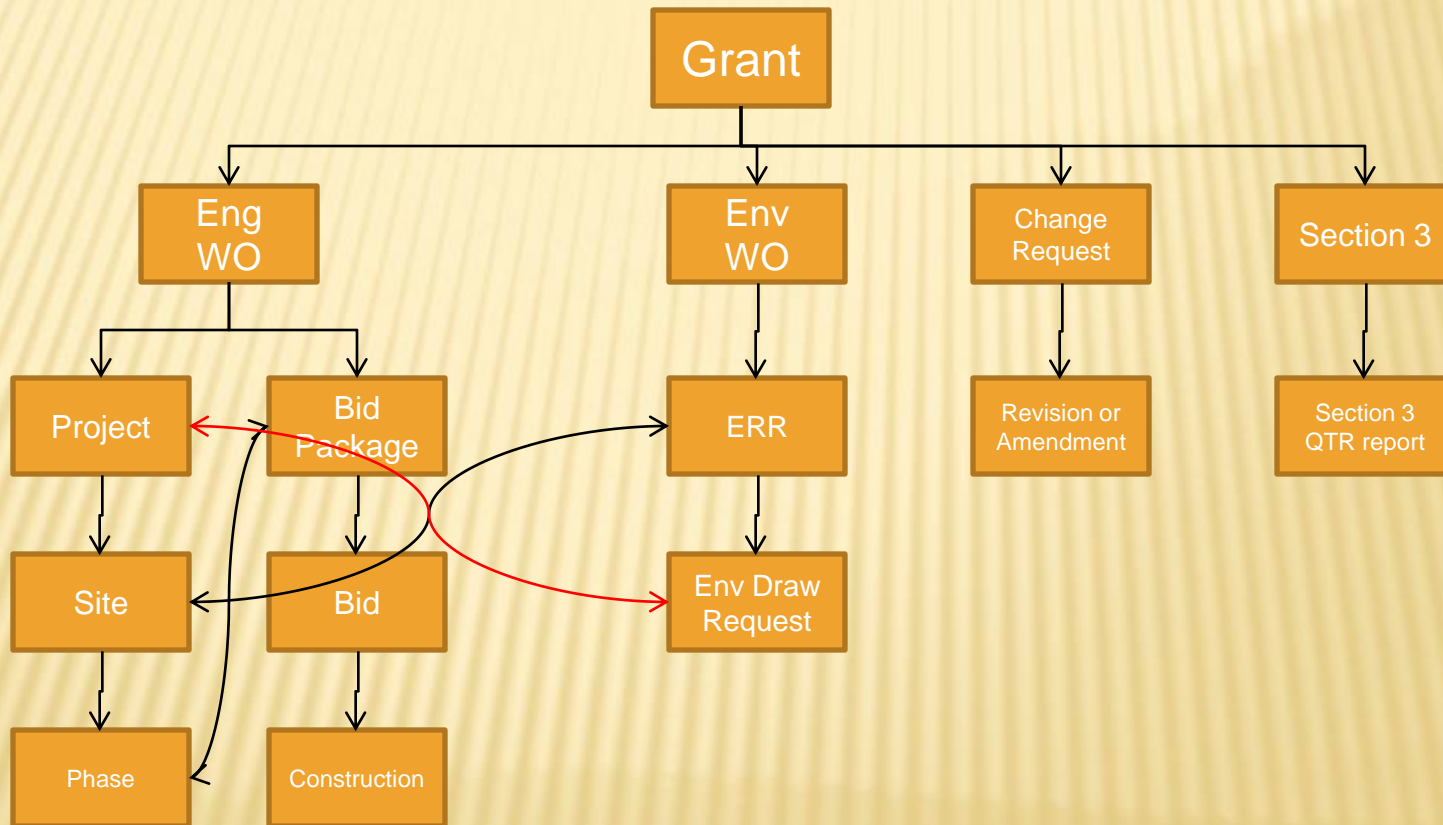
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## **Objects include the following:**

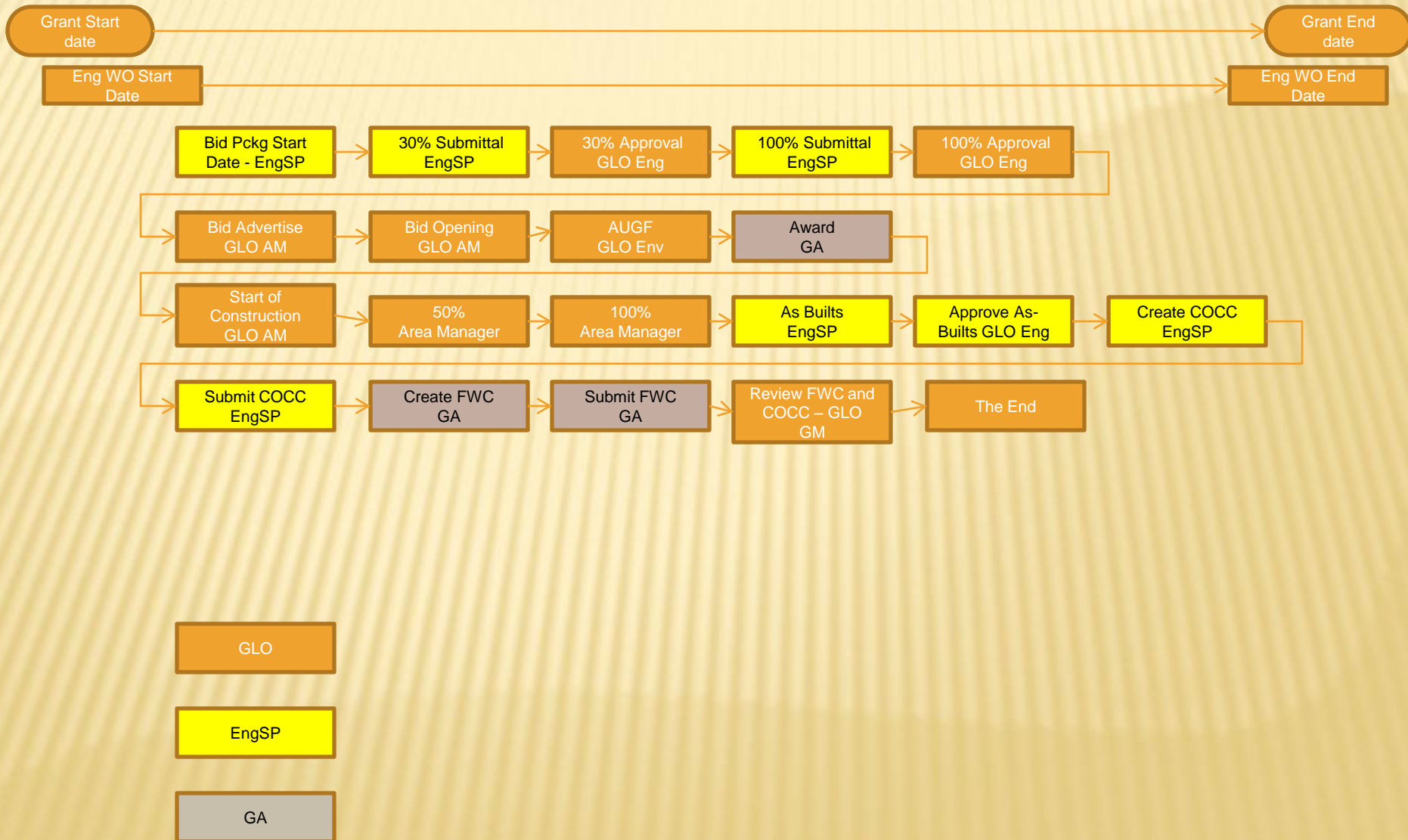
- The Grant
  - The Eng WO
  - The Project
  - The Site
  - The Phase
  - The Bid Package
  - The Bid
  - The Construction
  - The Env WO
  - The ERR
  - Amendments
  - Section 3
- 
- The Grant may have multiple Eng WO's and Env WO's.
  - The Eng WO may have multiple Projects
  - The Projects will have a default of one site but may have multiple sites.
  - The Site will have a default of one Phase, but may have multiple Phases.
  - You can have multiple bid packages. They are related through the phases.
  - The Bid package will become a Bid once it receives the 100% approval.
  - The Bid will become a construction once it is awarded.
  - The Construction Object takes you through the COCC.

# T-RECS

## OBJECTS AND CHILD OBJECTS

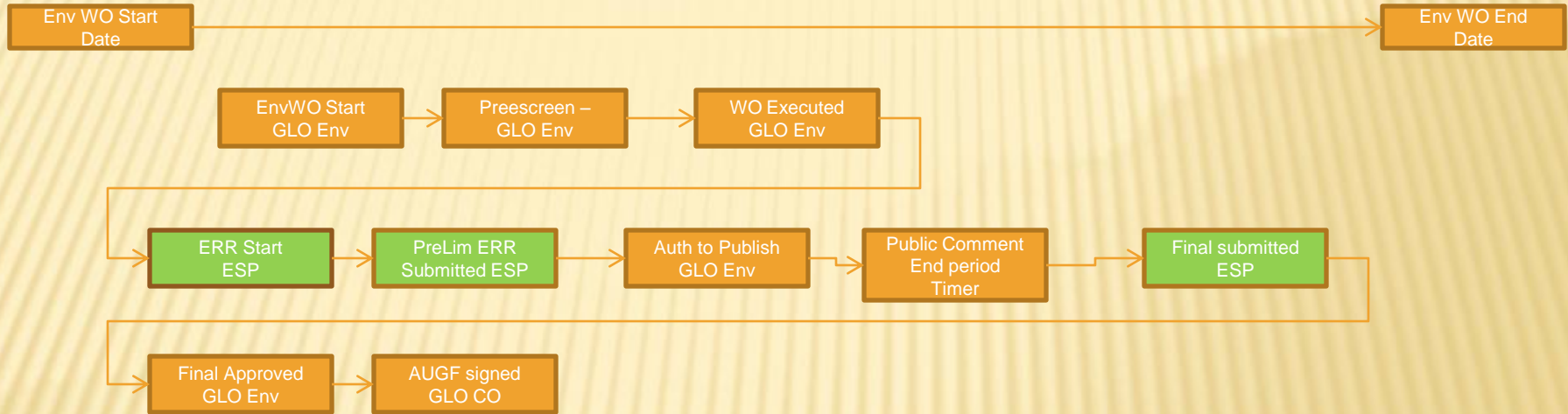


# MILESTONES FOR BID PACKAGE/BID/CONSTRUCTION





# MILESTONES FOR ERR



GLO

ESP

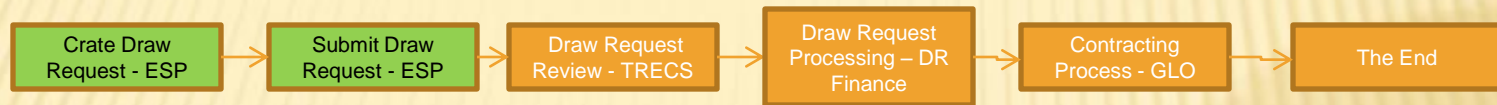
# MILESTONES FOR CHANGE REQUEST



GLO

GA

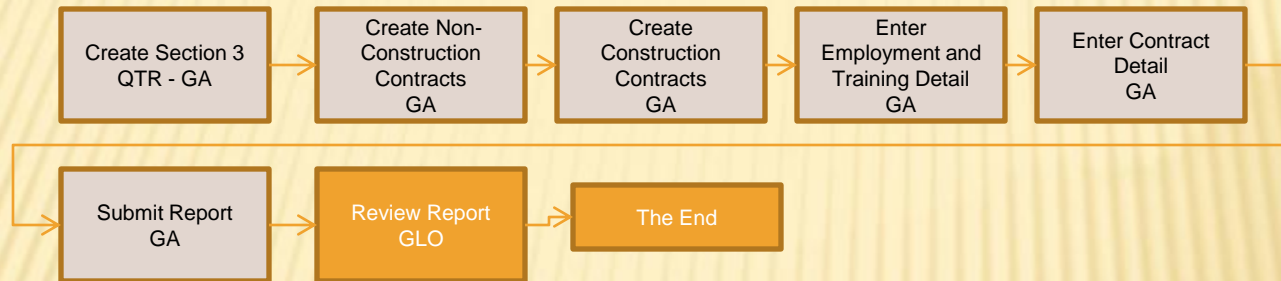
# MILESTONES FOR ENV DRAW REQUEST



GLO

ESP

# MILESTONES FOR SECTION 3



GLO

GA



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Bid Package  
Design Phase  
GA does not have any tasks  
in this WorkFlow

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# Start of Bid WorkFlow Process

\*This is for GA/Grantees, Env TL's and AM's\*

# FROM BID PACKAGE TO BID

Once the Bid Package Is approved, it becomes a Bid.

The milestones in this step Of the process include:

1. The Advertisement of Bid
2. Bid opening
3. AUGF
4. Bid Award

However, you may not award Unless you've received the AUGF.

Owner of task is indicated next to the milestone

**Bid Tracking (Procurement)**

Tasks: Bid - 60171-1\_BID3 - Install 350 kw diesel Generator and Site Improvements - 61189

Save and Close, Save and New, Cancel and Close, Copy Object, Delete, Add to Favorites, Refresh, Discussions, Compose, Upload, Print, Print Preview, Forms, Create, First Object, Previous Object, Next Object, Last Object

BidPkg Fields: BidMainView P1\* | Phases: BidEditView MGR ONLY\* | Environmental Workorders: User Assignments | Constructions: BidPkg Fields MGR ONLY

Bid - 60171-1\_BID3 - Install 350 kw diesel Generator and Site Improvements - 61189 | Created By: JCAINE | 9/20/2013 12:58:17 PM

**Bid**

<b>Bid Number *</b>	<b>Bid Title *</b>
60171-1_BID3	Install 350 kw diesel Generator and Site Improvements
<b>Bid Status *</b>	<b>Bid Description *</b>
AUGF Received	Install 350 kw diesel Generator and Site Improvements - West Brownsville Storm Water Pump
<b>Next Milestone Due Date</b>	
11/15/2011	

**Milestone Tracking**

<b>Target Advertised Date</b>	<b>Actual Advertised Date</b>	<input checked="" type="checkbox"/> <b>Advertised (AM)</b>
9/11/2011	9/11/2011	
<b>Target Bid Opening Date</b>	<b>Actual Bid Opening Date</b>	<input checked="" type="checkbox"/> <b>Bid Opening (AM)</b>
11/8/2011	11/8/2011	
	<b>Actual AUGF Received Date</b>	<input checked="" type="checkbox"/> <b>AUGF Issued (EnvTL)</b>
	11/6/2013	
<b>Target Award Date</b>	<b>Actual Award Date</b>	<input checked="" type="checkbox"/> <b>Award (GA)</b>
11/15/2011	11/15/2011	

**Related Work Order**

<b>Work Order Number</b>	<b>WorkOrder Title</b>
60171-1	Self Performer
<b>Eng Svc Provider Contract</b>	<b>Engineering Service Provider Name</b>
	Brownsville
<b>Grant Number</b>	<b>Grantee Name</b>
DRS010018	Brownsville
<b>Grantee First Name</b>	<b>Grantee Last Name</b>
Brownsville	City
<b>Grantee Phone</b>	<b>Grantee Email</b>
<b>Grant Admin Contract</b>	<b>Grant Administrator Name</b>
pending	Brownsville

History | Documents

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# Construction WorkFlow

\*For GA's, EngSP, Grantees, GMs and AM's\*



# CONSTRUCTION WORKFLOW

Once the Bid is awarded, it becomes a Construction.

The tasks in this step of the process include:

1. Start of Construction
2. Construction 50%
3. Construction 100%
4. As Built Submitted
5. Final Wage Submitted
6. COCC Submitted

The GA is responsible only for task 5.

The screenshot displays the 'Construction - 69452' window in the 'Construction Tracking' application. The interface includes a top toolbar with various actions like 'Save', 'Copy Object', 'Delete', 'Add to Favorites', 'Refresh', 'Discussions', 'Compose', 'Upload', 'Print', 'Print Preview', 'Forms', 'First Object', 'Next Object', and 'Last Object'. Below the toolbar, the 'Construction' section is highlighted in pink. It contains fields for 'Construction Number' (S221304-1), 'Construction Title' (Clear detention pond Flood and Drainage Facilities - Construction shall take place on the Tiger), 'Construction Status' (Pending), and 'Construction Description' (Clear detention pond Flood and Drainage Facilities - Construction shall take place on the Tiger). The 'Next Milestone Due Date' field is empty. Below this, the 'Milestone Tracking' section is also highlighted in pink. It lists several milestones with target and actual dates, and checkboxes for completion. A black circle highlights the checkboxes for 'Start of Construction (AM)', 'Construction at 50% (AM)', 'Construction at 100%', 'AsBuilt Submitted (EngSP)', 'Final Wage Submitted (GA)', and 'COCC Submitted (GA)'. An arrow points from the text 'The GA is responsible only for task 5.' to the 'Final Wage Submitted (GA)' checkbox. The 'Financial Tracking' section shows 'Total Budgeted Cost' as \$0.00. The 'Originating Bid' section shows 'Bid Package Number' 225301-1\_BID1 and 'Bid Package Title' Clear detention pond Flood and Drainage Facilities. The 'Assigned Labor Standards Officer' section is at the bottom.

Construction		
Construction Number *	S221304-1	
Construction Title *	Clear detention pond Flood and Drainage Facilities - Construction shall take place on the Tiger	
Construction Status *	Pending	
Construction Description *	Clear detention pond Flood and Drainage Facilities - Construction shall take place on the Tiger	
Next Milestone Due Date		

Milestone Tracking Add milestone for Final Wage Compliance Report		
Target Start Date	Actual Start Date	<input type="checkbox"/> Start of Construction (AM)
2/14/2014		
Target 50% Date	Actual 50% Date	<input type="checkbox"/> Construction at 50% (AM)
6/15/2014		
Target 100% Date	Actual 100% Date	<input type="checkbox"/> Construction at 100%
10/14/2014		
Target AsBuilt Date	Actual AsBuilt Date	<input type="checkbox"/> AsBuilt Submitted (EngSP)
Target Final Wage Compliance Date	Actual Final Wage Compliance Date	<input type="checkbox"/> Final Wage Submitted (GA)
Target COCC Date	Actual COCC Date	<input type="checkbox"/> COCC Submitted (GA)
12/12/2014		

Financial Tracking		
Total Budgeted Cost *	Total Budgeted Days	Average Budgeted Monthly Cost
\$0.00		

Originating Bid	
Bid Package Number	Bid Package Title
225301-1_BID1	Clear detention pond Flood and Drainage Facilities
	Bid Package Description
	Clear detention pond Flood and Drainage Facilities - Construction shall take place on the Tiger

Assigned Labor Standards Officer		
Contract Number	First Name	Last Name

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# Environmental Review Record

GA Does not have any tasks  
in this WorkFlow

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# Start of Change Request Process

Process Owner: GA

T-RecS will provide you with the latest copy of the PBS (Performance Statement, Budget, Schedule). You will be prompted to update these documents. DO not use your own copies. Once the CR is executed, our contracts team will update the PBS.



# CHANGE REQUEST

The GA will go to the appropriate Grant to initiate a Change Request.

1) Click on the Change Request Tab

Go to next slide

Grant - Hurricane Nick - 9793

Grant - Hurricane Nick - 9793

Created By: SERGIOSUPER  
6/20/2013 4:14:28 PM

**Grant**

Start Date 6/20/2013	Grant Number 2909	Grant Title Hurricane Nick
End Date 11/30/2013	Award Amount \$2,200,000.00	GLO Contract Number GLO-DRS-XXXXXX
Extension Date	Contracted Amount to CoGs \$0.00	Round 21

**Grantee**

Contract Number 2909	First Name Elected	Last Name Official
Loginname EOfficial	Email rascameElCacho@simon.com	Vendor Name Ciudad Juarez

**Grant Manager**

Contract Number none	First Name Grant	Last Name Manager1
Loginname GM1	Email gm1	Vendor Name TEXAS GENERAL LAND OFFICE

**Grant Administrator**

Contract Number DRS016004	First Name GrantAdmin	Last Name Carl R. Griffith and Associates
Loginname GA4887	Email none@email.net	Vendor Name Carl R. Griffith and Associates

**PMC / Area Manager**

Contract Number DRS013000	First Name ProjectManager	Last Name HNTB Corporation
Loginname PMHNTR	Email none@email.net	Vendor Name HNTB Corporation

Owner: GA

# CHANGE REQUEST TAB

After clicking the CR Tab, the GA will see a list of previously created CRs if any.

1)Click on Create Object

Grant - Hurricane Nick - 9793

Grant Tasks

Save Save and Close Save and New Cancel and Close Copy Object Delete Add to Favorites Discussions Compose Print Print Preview Forms Create First Object Previous Object Next Object Navigation

Grant Engineering Work Orders Environmental Work Orders Change Requests Section 3 Quarterly Report Admin Close Date

Grant - Hurricane Nick - 9793 Created By: SERGIOSUPER 6/20/2013 4:14:28 PM

VIEW - Grant - Change Requests for this Grant

Change Request Number	Change Request Title	Change Request Type	Date Submitted
134	Amendment 3	Amendment	7/9/2013

1 - 1 of 1 records prev 1 next Show 25 records

History Documents

Go to next slide

Owner: GA

# CHANGE REQUEST OBJECT

A new CR object will appear. The system automatically relates the CR to the appropriate Grant. Scroll down to see relationship.

## 1) Enter CR Title

Default of Revision. Based on Answers to interview, it will Automatically change to Amendment.

Date submitted is automatically Assigned.

## 2) Enter description

Approved date is done by An action.

Executed date is entered By contracts team when Amendment is executed.

The screenshot shows a web application window titled "ChangeRequest - 18166". The interface includes a top navigation bar with tabs for "Change Request" and "Tasks". Below the navigation bar is a toolbar with various icons for file operations (Save, Save and Close, Save and New, Cancel and Close, Copy Object, Delete, Add to Favorites, Discussions, Compose, Print, Print Preview) and navigation controls (Forms, First Object, Previous Object, Next Object, Navigation). The main content area is divided into sections: "Change Request" (highlighted in red), "User Assignments", and "Comments". The "Change Request" section contains a table with the following data:

Change Request Number	Change Request Title
137	

Below the table, there are fields for "Change Request Type" (Revision) and "Status" (Pending). Further down, there are date fields for "Date Submitted" (7/14/2013), "Date Approved", and "Date Executed". A "Summary" section contains a text area with the placeholder text "Replace this text with a summary of your request." At the bottom, there is an "Interview" section with a list of items and checkboxes:

- 1 ☐ Engineering Fee Increase or Decrease
- 1a ☐ Engineering Fee Change > \$5000
- 2 ☐ Adding New Activity or Deleting Entire Activity
- 3 ☐ Adding or Deleting a Project
- 4 ☐ Change In Beneficiary Information
- 5 ☐ Result of a Change Order
- 6 ☐ Extends Contract Expiration
- 7 ☐ Extends Construction End Date
- 8 ☐ Proposed Increase to GA Fee

Annotations with arrows point to the "Tasks" tab, the "Change Request" section header, the "Change Request Title" field, the "Change Request Type" field, the "Date Submitted" field, the "Date Approved" field, the "Date Executed" field, the "Summary" text area, and the "Interview" list.

## 3) Click on Task Tab

# START CR INTERVIEW

Upon clicking on the task tab, the GA will see a Start CR Interview button.

1) Click on Start CR Interview

The screenshot shows a web application window titled "ChangeRequest - 18166". The interface includes a "Tasks" tab and a "Change Request" tab. The "Change Request" tab displays the following information:

- Change Request Number:** 137
- Change Request Title:** [Empty field]
- Change Request Type:** Revision
- Status:** Pending
- Date Submitted:** 7/14/2013
- Date Approved:** [Empty field]
- Date Executed:** [Empty field]
- Summary:** Replace this text with a summary of your request.
- Interview:** A list of 8 items, each with a checkbox and a description:
  - 1 ☐ Engineering Fee Increase or Decrease
  - 1a ☐ Engineering Fee Change > \$5000
  - 2 ☐ Adding New Activity or Deleting Entire Activity
  - 3 ☐ Adding or Deleting a Project
  - 4 ☐ Change In Beneficiary Information
  - 5 ☐ Result of a Change Order
  - 6 ☐ Extends Contract Expiration
  - 7 ☐ Extends Construction End Date
  - 8 ☐ Proposed Increase to GA Fee

The "Interview" section also includes a legend: "Checked = YES" and "Unchecked = NO".

Owner: GA



# INTERVIEW

[Workflow] User Interaction

Is there an Engineering Fee increase or decrease?

[Workflow] User Interaction

**Engineering Fee Change**

Current Engineering Fee: 130060.05

New Engineering Fee:

[Workflow] User Interaction

Are you adding a new activity or deleting an entire activity?

[Workflow] User Interaction

Are you adding or deleting a project within an activity?

[Workflow] User Interaction

Does this extend the Contract Expiration Date?

[Workflow] User Interaction

Does this extend the Construction end date?

[Workflow] User Interaction

Is there a proposed increase in the GA Fee?

[Workflow] User Interaction

Is there a budget transfer between Grantee retained funds and a State Contracted Service Provider?

[Workflow] User Interaction

Does this change the Total Grant Award Amount?

[Workflow] User Interaction

Is this the result of a Construction Change Order?

[Workflow] User Interaction

Is there a change in the Beneficiary Information?

[Workflow] User Interaction

The Change Request requires you to upload or revise the following required documents: ; Engineering Fee Breakdown; Change Order Ensure they are in OnBase and indexed with the proper CR Number: 137

Owner: GA

# CR DOC IMPORT

Based on the answers provided by the GA the system will require the GA to upload certain documents. The documents are listed at the bottom of the CR object.

The GA can review his/her answers by looking at the 12 item list. If it's checked off, the GA answered yes. If the GA made a mistake, click on "Start CR Interview" again and change your answer. You will need to go through the entire interview again.

Review answers

1.A)Change answers

List of documents needed

1.B)Click on Import and repeat until All Docs have been uploaded.

ChangeRequest - 18166

Workflow Queues | Start CR Interview | AS - Eval and or Revise

Change Request | User Assignments | Comments

ChangeRequest - 18166

Created By: MANAGER  
7/14/2013 10:01:50 AM

Unchecked = NO

- 3 ☒ Adding or Deleting a Project
- 4 ☒ Change In Beneficiary Information
- 5 ☒ Result of a Change Order
- 6 ☒ Extends Contract Expiration
- 7 ☒ Extends Construction End Date
- 8 ☒ Proposed Increase to GA Fee
- 9 ☒ Budget Transfer from Grantee to State Contracted SP
- 10 ☐ Budget Transfer between HUD Activity Codes > 10%
- 11 ☐ Budget Transfer between HUD Activity Codes > 25%
- 12 ☒ Changes the Total Grant Award Amount

Grant Number: 2909 | Grant Title: Hurricane Nick | Award Amount: \$2,200,000.00

GLO Contract Number: GLO-DRS-XXXXXX | Grantee Vendor Name: Ciudad Juarez

☒ Change To Performance Statement | ☒ Change To Budget | ☒ Change To Schedule

☐ Needs Engineering Review | ☐ Needs Environmental Review

CR Bid Schedule | Import | CR Budget | Import

CR Budget EForm | Import | CR Construction Change Order | Import

CR Construction Schedule | Import | CR Engineering Fee Breakdown | Import

CR Man-Hour Breakdown | Import | CR Performance Statement | Import

History | Documents

Owner: GA

# CR DOCUMENT IMPORT

After clicking the Import button a new window will open.

1) Select CR Documents

2) Select appropriate Doc Type

3) Enter GLO CR Number

4) Click on Browse and select appropriate doc from your computer

5) Click on upload

ChangeRequest - 18166 - Upload Document

Upload

Browse Acquire Upload Cancel Move Up Move Down Remove Remove All Rotate Left Rotate Right

Document Type Group  
Change Request Documents

Document Type  
CR - Budget Eform

File Type  
MS Word Document

Document Date  
7/14/2013

Keywords

GLO CR Number  
137

GLO CR Title

GLO CR ID  
137

GLO CR ObjectID  
18166

GLO Grant Number  
2909

GLO Grantee Name  
CIUDAD JUAREZ

GLO Contract Number

Options

Upload Cancel

C:\Documents and Settings\SRamirez\Local Settings\Temp\Hyland Letter-copy.docx

Home Insert Page Layout References Mailings Review View Developer

Times New Roman 12

Clipboard Font Paragraph Styles Editing

Mark Tortelli  
Hyland Software  
28500 Clemens Road  
Westlake, OH 44145  
Phone 440-788-6364

RE: Invoice # 214218 & #214219

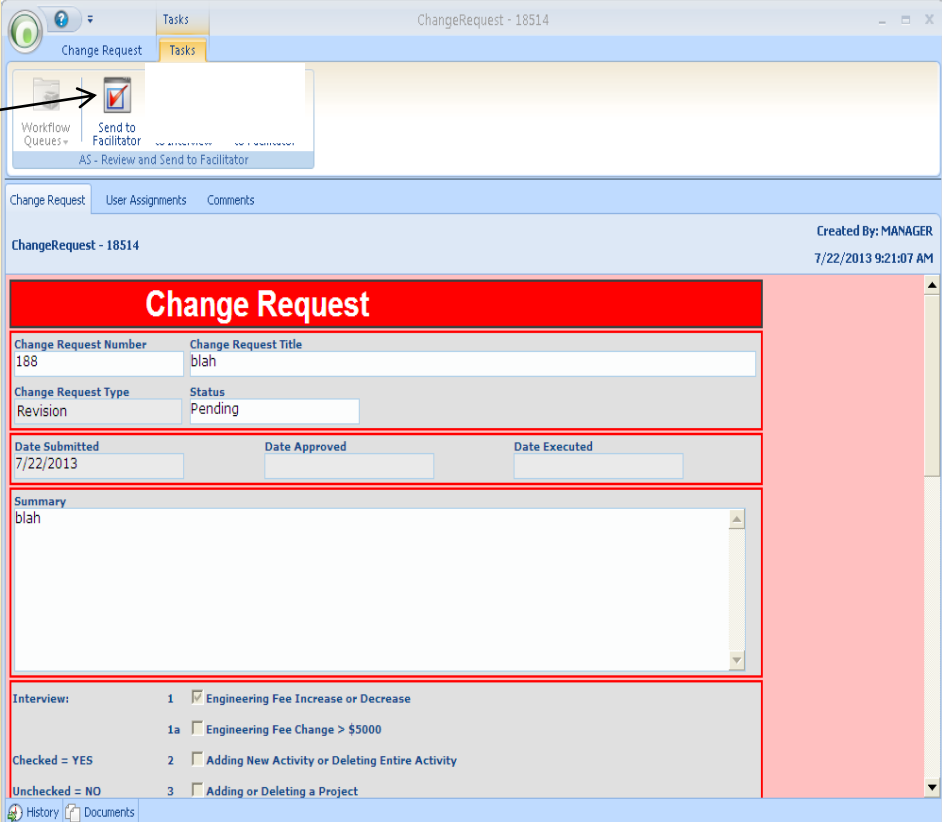
Mark,

As previously communicated, both invoices mentioned above were placed on hold Mar 22<sup>nd</sup> because the billing milestones were not met. Once the billing milestones were met, the Land Office made multiple requests to Hyland to resubmit the invoices with a current date. As of June 5<sup>th</sup>, 2013 the Land Office has not received updated invoices from

# SEND TO FACILITATOR

1) Click on Send to Facilitator

This action will bring up the PBS.



The screenshot shows a web application window titled "ChangeRequest - 18514". The interface includes a top toolbar with a "Send to Facilitator" button (indicated by an arrow from the instruction text). Below the toolbar, there are tabs for "Change Request", "User Assignments", and "Comments". The main content area displays details for "ChangeRequest - 18514", including a red header "Change Request", a form with fields for "Change Request Number" (188), "Change Request Title" (blah), "Change Request Type" (Revision), and "Status" (Pending). It also shows "Date Submitted" (7/22/2013), "Date Approved", and "Date Executed". A "Summary" section contains the text "blah". At the bottom, there is an "Interview" section with a list of items, each with a checkbox and a description. The bottom of the window has a "History" and "Documents" section.

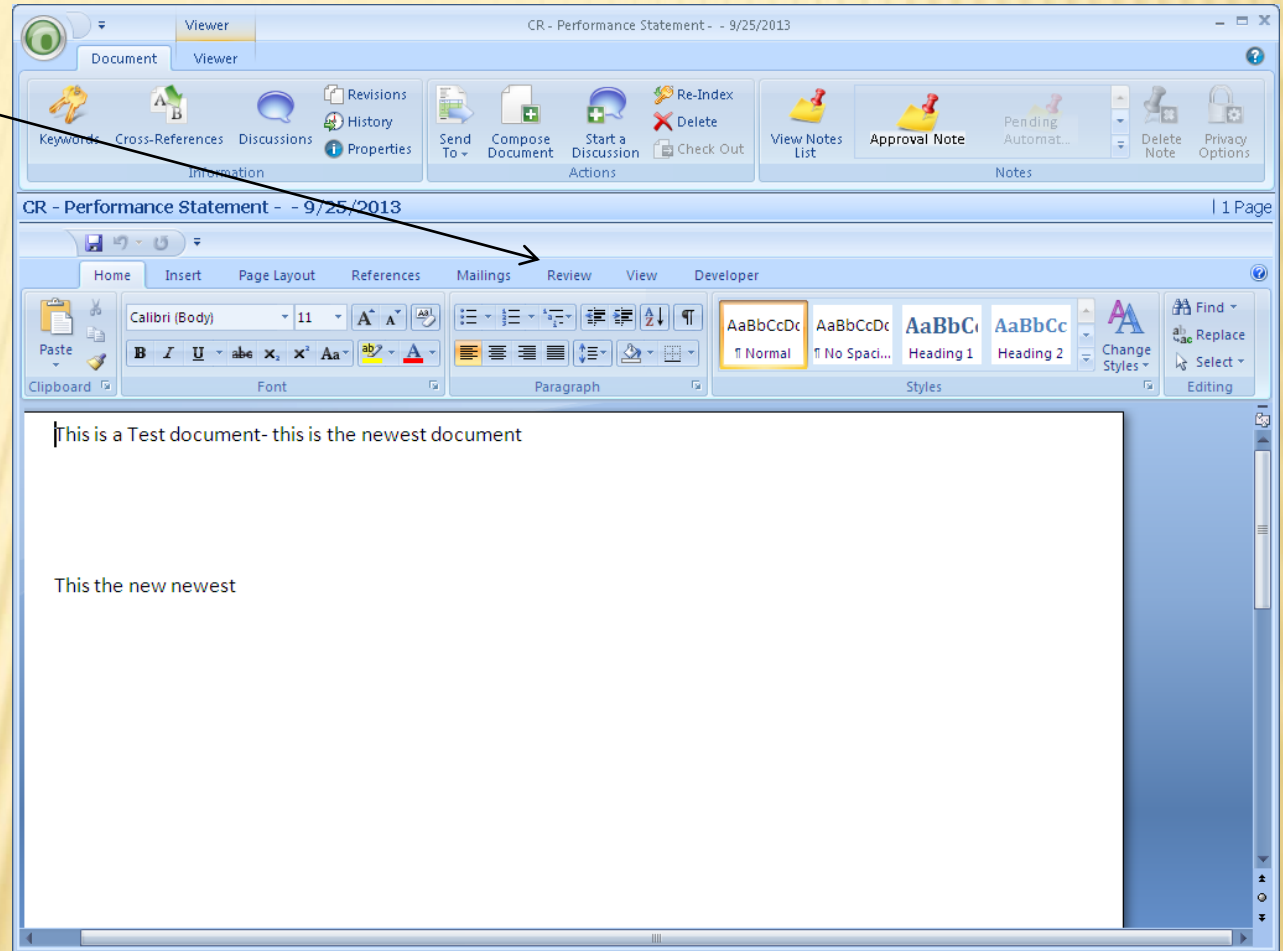
Change Request		
Change Request Number	Change Request Title	
188	blah	
Change Request Type	Status	
Revision	Pending	
Date Submitted	Date Approved	Date Executed
7/22/2013		
Summary		
blah		
Interview:		
1	<input checked="" type="checkbox"/>	Engineering Fee Increase or Decrease
1a	<input type="checkbox"/>	Engineering Fee Change > \$5000
2	<input type="checkbox"/>	Adding New Activity or Deleting Entire Activity
3	<input type="checkbox"/>	Adding or Deleting a Project
Checked = YES		
Unchecked = NO		

History Documents



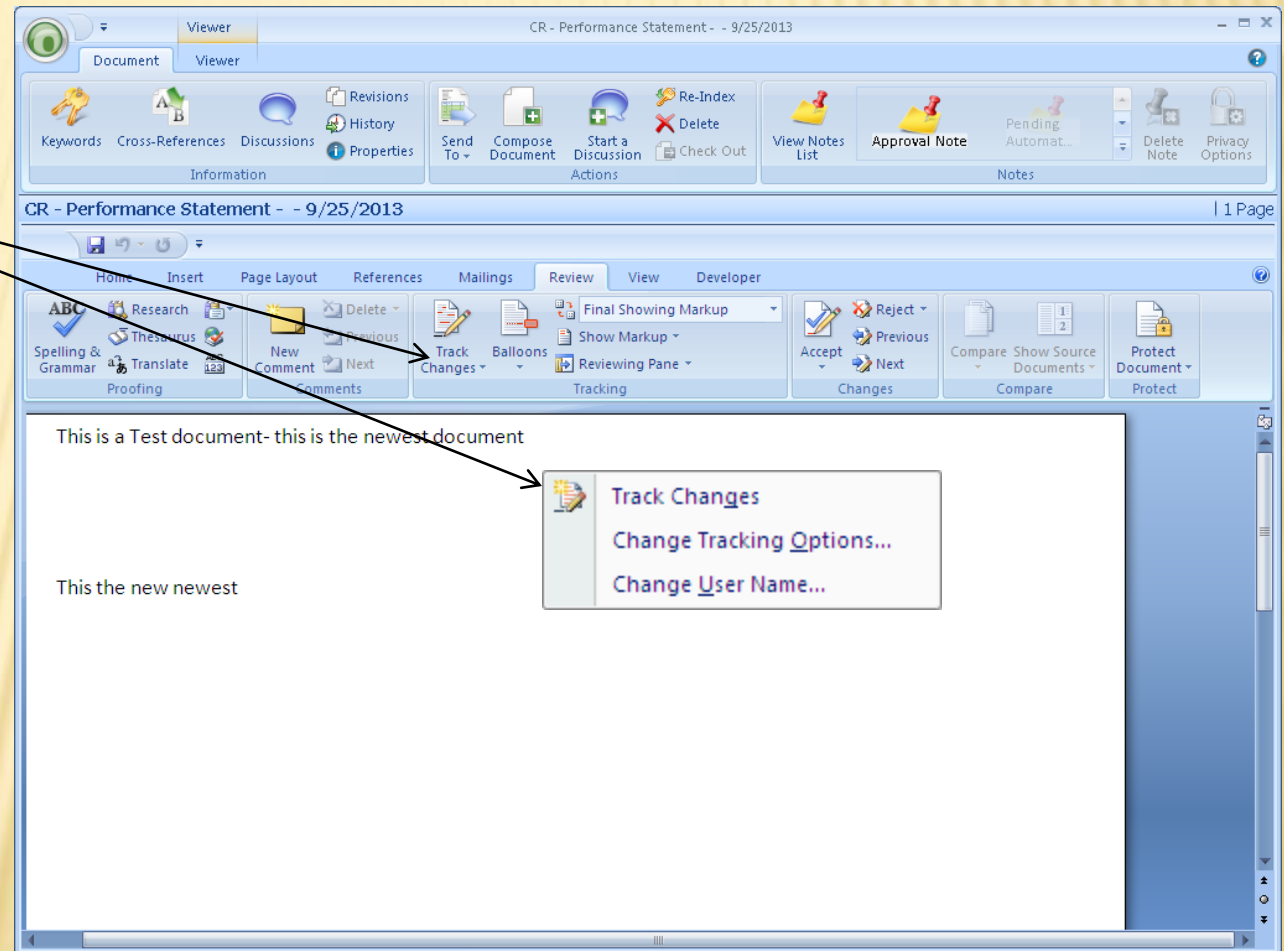
# UPDATING PBS DOCUMENTS

Click on Review



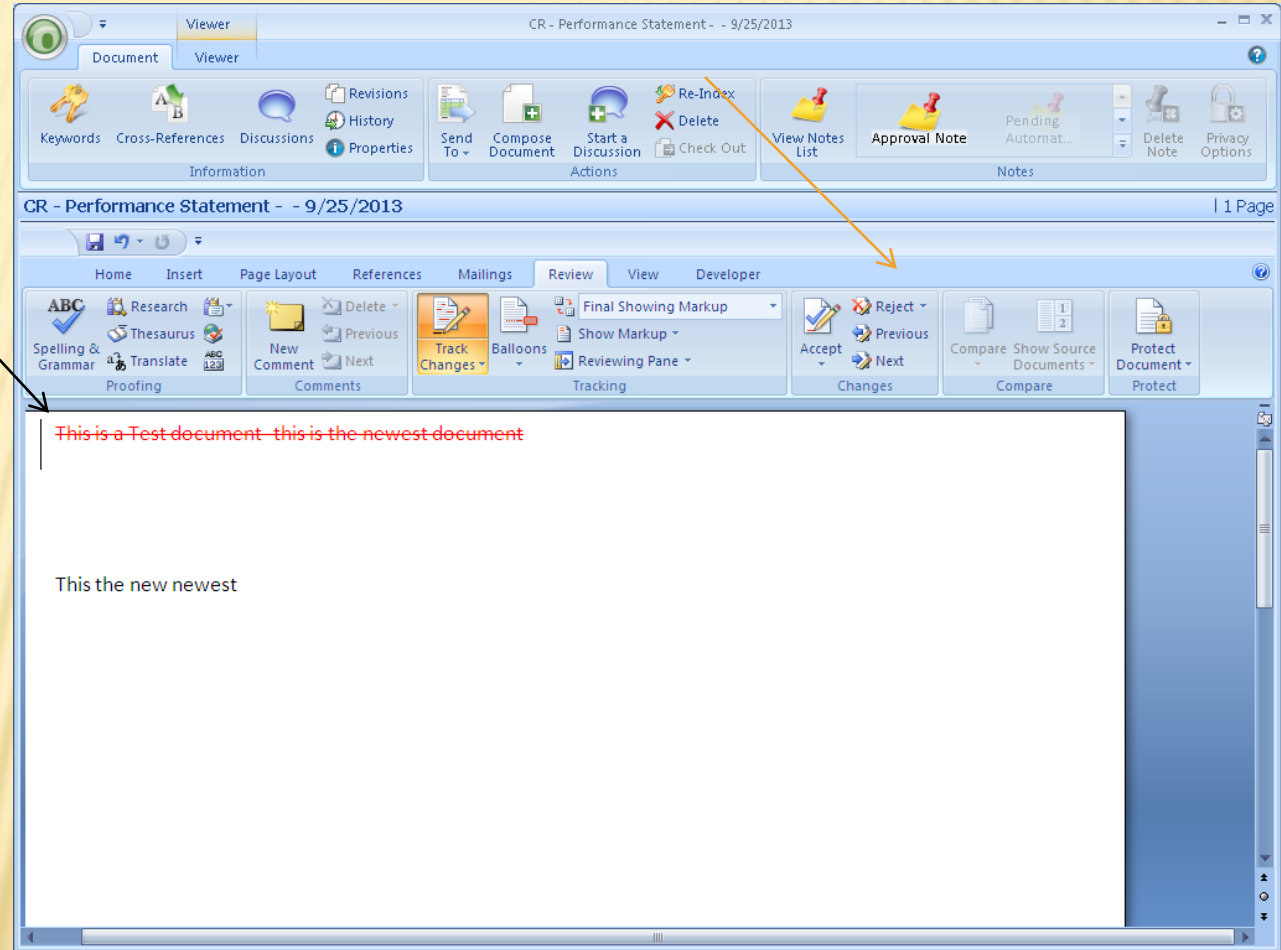
# TRACK CHANGES

Click on Track  
Changes



# EDIT ACCORDINGLY

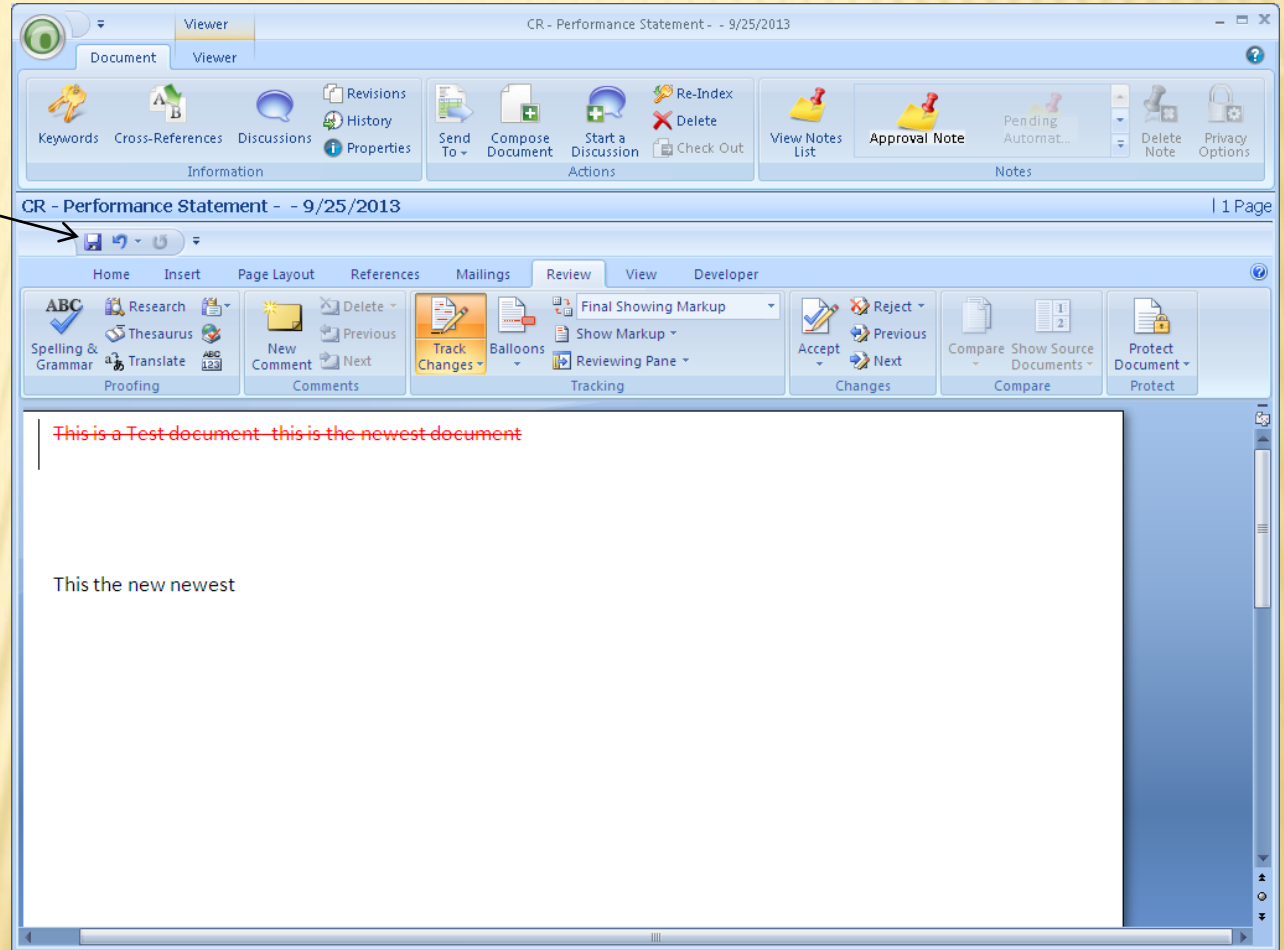
Note that any  
edits will be  
redlined



When done, click  
On the save button

# SAVE REVISED DOCUMENT

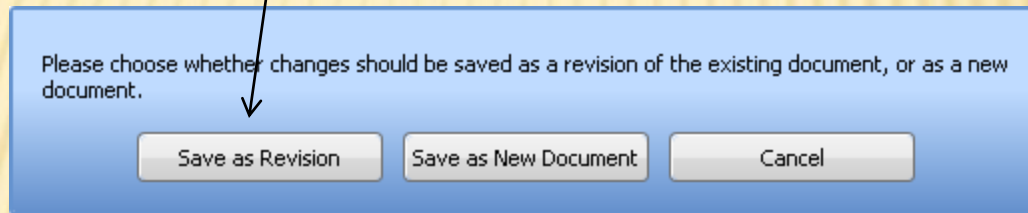
Click on the  
save button





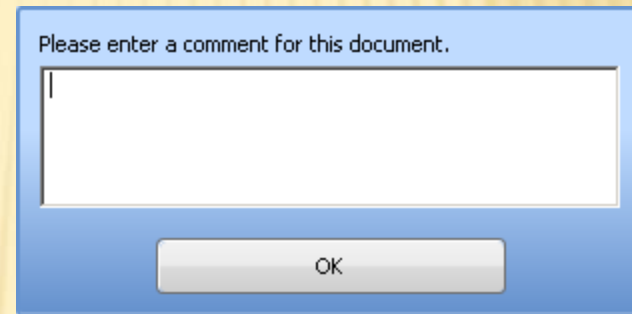
# SAVE AS REVISION – DO NOT SAVE AS NEW

SAVE AS A REVISION> **DO NOT SAVE AS NEW**



# COMMENT BOX

- ✖ You will be prompted for a comment.
- ✖ Enter comment
- ✖ Click Okay
- ✖ End of Process



Please enter a comment for this document.

OK

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# Start of Change Request Process

## Process Owner: GA

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# End of Change Request Process for GA